Center for Educational Performance and Information (CEPI)

Michigan Student Database System (MSDS)

Institution of Higher Education (IHE) Request for Unique Identification Code (UIC) Collection

User's Guide

V 2.0

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Introduction

This guide has been developed as part of a set of paper-based training materials and is intended for the use of the online Institution of Higher Education (IHE) Request for Unique Identification Code (UIC) Collection in the Web-based Michigan Student Data System (MSDS) application. This guide includes directions for gaining access to the MSDS and using the MSDS to upload files, performing UIC Resolution, requesting to link UICs, downloading reports and using the additional functionality such as the manual data entry and the Student Search features.

Background

When Michigan representatives agreed to accept State Fiscal Stabilization Fund dollars under the American Recovery and Reinvestment Act (ARRA), they also agreed to four education assurances. One of these assurances is that the state of Michigan will connect preschool through postsecondary (P-20) education data and to the labor force to evaluate the effectiveness of public education at preparing students for postsecondary education and the workforce. Connecting pre-kindergarten through twelfth-grade (PK-12) to postsecondary education data requires that the UICs assigned and maintained by CEPI be exchanged among institutions and used at all education levels. In order to fulfill these requirements, Michigan must collect and store portions of each student's academic record in a data repository for analysis. The Student Transcript and Academic Record Repository (STARR) application is the means to collect and store these data.

Before student academic record data can be uploaded to the STARR, each enrolled student must have a UIC. Transcripts are currently being sent electronically from high schools to IHEs from a transcript exchange service provided by Docufide, Inc. These transcripts contain UICs. For those students who are enrolled in your institution but for whom you do not have a UIC, CEPI has created the IHE Request for UIC Collection. This collection resides in the CEPI Web-based application called the MSDS.

IHE Request for UIC Collection Overview

The IHE Request for UIC Collection is the means for staff members at IHEs to acquire UICs for currently enrolled students who do not have UICs. During the designated timeframe, the authorized staff member at the IHE will upload an XML file containing the necessary student information to the MSDS to match against those records in the MSDS UIC master table. If an existing UIC is found, that UIC will be associated with the student record; if no match is found, a new UIC will be created for the student. If possible matches exist; they will be presented to the user to decide which UIC should be associated with the student. The file containing the UICs would then be downloaded by the IHE to incorporate into its local student information system. Authorized staff members can also utilize the Student Search functionality in the MSDS to look up existing UICs using either complete or partial core demographic fields (first name, last name, date of birth and gender).

The IHE Request for UIC Collection file must be XML compliant. CEPI has provided instructions for utilizing XML validation tools on the CEPI Web site. This is an essential step to ensure that the file uploaded will pass basic file-level validation. Please refer to the CEPI MSDS Web page at: http://www.michigan.gov/cepi/0,1607,7-113-986_50502---,00.html and use the XML Validation Guide available in the Resources box. CEPI recommends following the deadlines and actions below to prepare for and complete the IHE Request for UIC Collection.

Timeline

The IHE Request for UIC Collection will be open January 9, 2012 through February 28, 2012. The Collection will reopen April 2, 2012 through June 14, 2012. These upload timeframes were scheduled around peak PK-12 collection times in the MSDS. Table 1 depicts the collection open windows.

Table 1

UIC Submission Windows *IHEs are not able to obtain UICs in November 2012 and March 2013 because of K-12 data collection.*		
	Open Date	**Close Date**
Bulk File Upload	Sep. 19, 2012	Oct. 31, 2012
	Dec. 10, 2012	Feb. 28, 2013
	Apr. 1, 2013	Jun. 14, 2013
Student Search	Ongoing	Ongoing

Checklist for Obtaining UICs

This is a checklist of suggested tasks that IHE users can perform in order to prepare for and complete the IHE Request for UIC Collection:

☐	1.	Obtain access to the Michigan Student Data System (MSDS).
		    1. Create a Single Sign-On (SSO) account
		    2. Subscribe to the MSDS
		    3. Fax to CEPI the appropriate security agreement signed by the institution's Registrar.
		
		Tip: The Single Sign-On Registration User's Guide can be found at the following link: http://www.michigan.gov/documents/cepi/SSO_registration_251200_7.pdf. The IHE User Security Agreement can be found at the following link: http://www.michigan.gov/documents/cepi/IHE_MSDS_security_337131_7.pdf

☐	2.	Develop the export file from your local student information system, and make sure the file conforms to the IHE Request for UIC Collection XML schema. *Tip: Reference the IHE Request for UIC web site for the XML schema, XML sample and collection components specifications. The IHE Request for UIC Web site can be found at the following link: http://www.michigan.gov/cepi/0,1607,7-113-986_50502_56413---,00.html*
☐	3.	Review the collection timeline on page 3 of this user's manual.
☐	4.	Become familiar with the IHE Request for UIC Collection. *Tip: A frequently asked questions (FAQ) document, acquiring UICs flowchart, PowerPoint overview presentation and a complete listing of all communications sent regarding the IHE Request for UIC Collection can be found at the following link: http://www.michigan.gov/cepi/0,1607,7-113-986_50502_56413---,00.html*
☐	5.	Know your entity code. *Tip: How to search for your entity code in CEPI's Educational Entity Master (EEM) is provided in this document. A document on how to search for your entity code can also be found at the following link: http://www.michigan.gov/documents/cepi/search_for_entity_code_340302_7.pdf*
☐	6.	Validate your XML file prior to uploading to the MSDS. *Tip: An XML Validation Guide is available at the following link: http://www.michigan.gov/documents/cepi/Validating_XML_File_297477_7.pdf*
☐	7.	Review the number of new UICs generated and the records that resulted in a match found. *Tip: It is highly recommended that the user select the **List of New UICs Created** and the **List of Positive Matches** from the dropdown menu on the Staging Area Details screen in the MSDS to check the results of these reports against the uploaded data. These reports may help identify data quality issues.*
☐	8.	Review and resolve any records that require resolution.
☐	9.	Download the file with the UICs on the records. *Tip: All downloaded files are zipped and in XML format. The XML file can be saved and opened in Excel. Large files may be separated into smaller files to avoid system time-out issues. Make sure to download all relevant files. A sample of the XML download appears in Appendix A.*

Gaining Access to the MSDS

Staff members wishing to have access to the MSDS will need to complete a two-step process, which consists of:
1. Obtaining a Single Sign-On (SSO) account and
2. Submitting a security form. Please view the SSO Registration User's Guide for instructions on how to obtain an account: **http://www.michigan.gov/documents/cepi/SSO_registration_251200_7.pdf**

If you experience problems with your account or password, please contact CEPI at 517-335-0505 or by e-mail at: CEPI@michigan.gov.

Tips for Gaining Access to the MSDS

- Security agreements must be signed by the registrar. CEPI staff will verify that the person listed as the registrar on the security agreement form matches the contact listed as the registrar in the membership directory on the MACRAO Web site.

- CEPI staff will also verify that a subscription request has been submitted in SSO and that the information provided on the security agreement form matches the request. Once verified, permission will be granted and the requester will be notified by e-mail.

- The SSO subscription expires after 30 calendar days. Please make sure your service agreement form is sent to CEPI about the same time that you request access to prevent auto-rejection notices.

- Access should be limited to only those persons who will be uploading the files or utilizing the student search function to do single student UIC lookups (should range between 2-5 people). MSDS IHE users typically include: technology group members, admissions staff and/or staff from the registrar's office.

Removing Access to the MSDS

When authorized users leave your organization, a removal request must be sent in. CEPI does an annual refresh notice as well. To access the removal request form:

1. Go to http://www.michigan.gov/cepi.
2. Click on **CEPI Applications.**
3. Under Application Information, click on **Removing an MEIS Authorized User.**
4. Follow the instructions for completion of the Removal Request Form.
5. Once the form is completed, print a copy, obtain the required signatures and fax to CEPI at (517) 335-0488.

To access the removal form directly, go to:
http://www.michigan.gov/documents/CEPI-MDE_MEISRemovalReqFrm_128431_7.pdf.

XML File Creation

The CEPI Web site provides the XML schema, sample schema and the collection components to include in the file for the IHE Request for UIC Collection. Locate these documents on the IHE Request for UIC Collection Web page at: http://www.michigan.gov/cepi/0,1607,7-113-986_50502_56413---,00.html

For more information about XML and schema validation, please refer to the MSDS Technical Document located on the CEPI MSDS Web page at:
http://www.michigan.gov/documents/cepi/MSDS_tech_support_251976_7.pdf

An XML Validation Guide is available at:
http://www.michigan.gov/documents/cepi/Validating_XML_File_297477_7.pdf

The World Wide Web Consortium (W3C) is the ultimate authority on XML data types. All collection schemas will reference the W3C definitions for the base data types. Please reference the appropriate collection schema and the W3C to ensure a valid file submission.

Due to each local student information system being different, CEPI cannot provide technical support for exporting data from each student information system.

Searching for Your Entity Code

When creating the IHE Request for UIC XML data file, a required component is the IHE entity code. The entity code in the XML schema is used for the SubmittingEntityCode and SchoolFacilityNumber characteristics. If you do not know your entity code, follow this look-up procedure in CEPI's Educational Entity Master (EEM):

1. Go to the CEPI EEM Web site at www.michigan.gov/eem. Enter your institution's name in the **EEM-Search** box. Click **Go**.

2. Your search will bring up the desired entity information within the Entity Code column. The entity code is a five-digit code which may include a leading zero. Please <u>do not</u> cut off the leading zero, as it is a digit in the code.
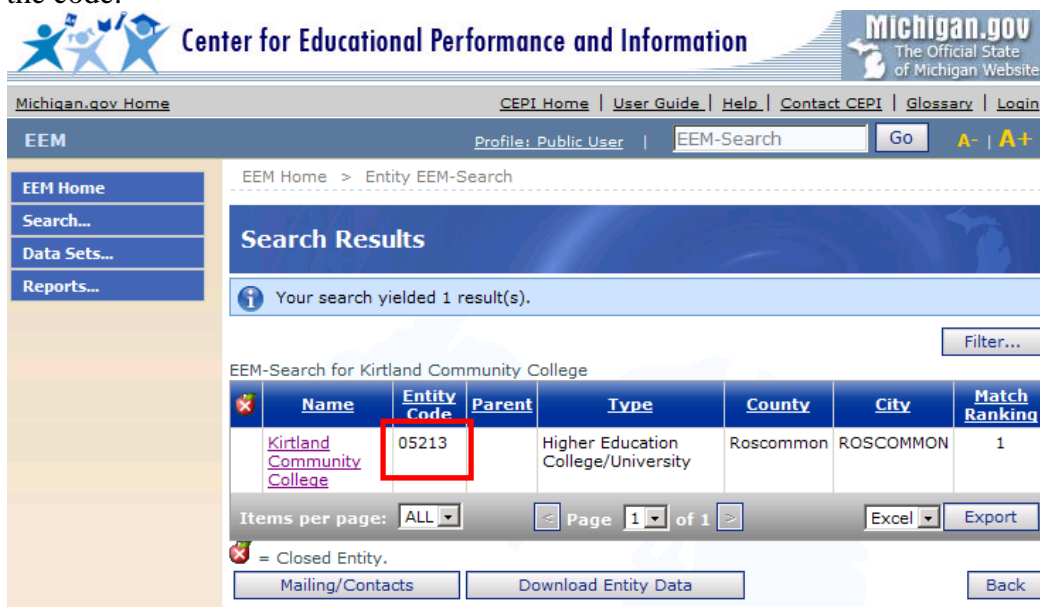
Logging in to the MSDS

Once you have an SSO account, you can access the MSDS. To access the MSDS:
1. Go to https://cepi.state.mi.us/msds/.
2. Click on the **Authorized User Login** button. This will take you to the State of Michigan SSO login page.
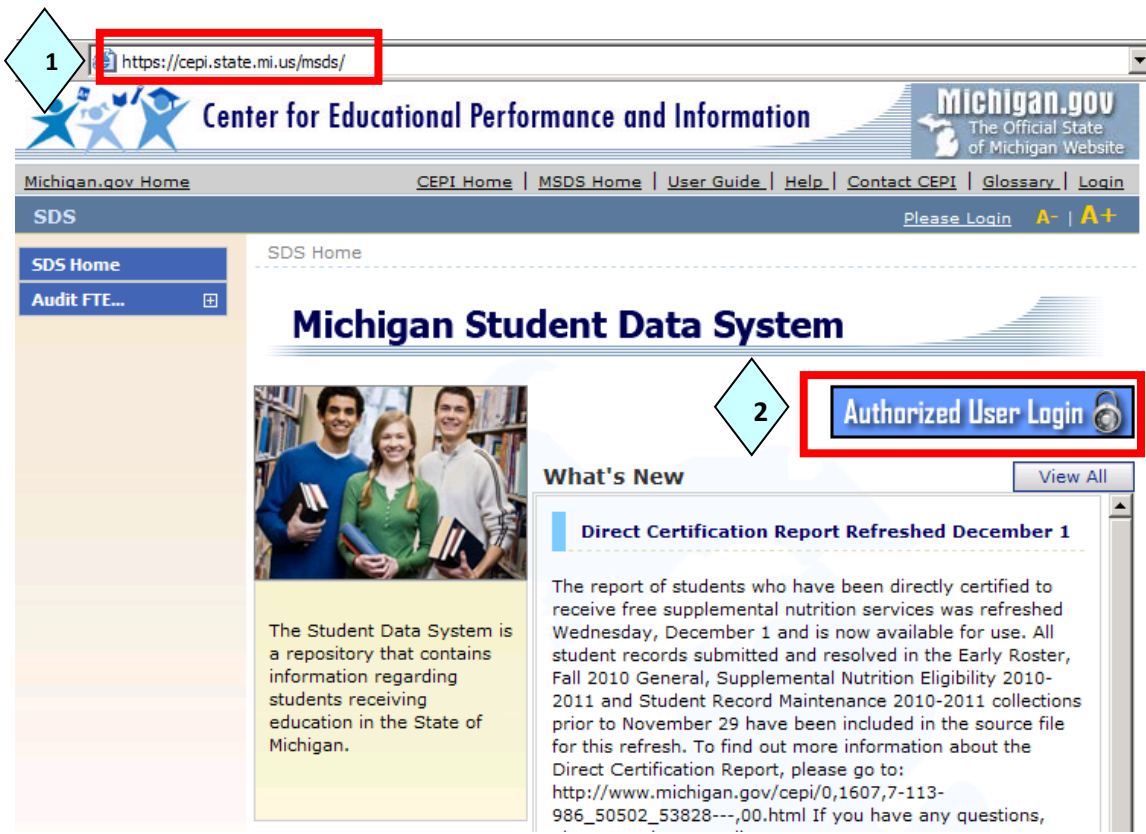
3. Enter your SSO User ID and Password.
4. Click the **Login** button. This will take you to the Application Portal page.

5. Select the **Michigan Student Data System (MSDS)**.

The MSDS provides authorized users with various roles depending on the level of access. For the IHE Request for UIC Collection:

6. Select the **IHE Uploader** role from the Select Profile dropdown menu and click the **Continue** button (this only applies to users with multiple roles).

Navigating the MSDS Home Page

On the next page is a screenshot of the MSDS home page. Various links and menus are available to help users navigate through the Web pages. The link definitions are provided below:

Top Links

- Michigan.gov Home - Displays the official Web page of the State of Michigan.
- CEPI Home - Displays CEPI's home page
- MSDS Home - The MSDS application's home page, which is a public Web page for information about the MSDS.
- User Guide - Displays the MSDS Training Manual in printable PDF format.
- Help - Opens the help system for *individual* MSDS screens. More information concerning help is available in the Help section of this manual.
- Contact CEPI - Provides information on how to contact CEPI for questions.
- Glossary - This opens a reference document that describes the terms unique to CEPI.
- Log Off - Ends current login session.

Menu

Note: The Certified Data Reports, Audit FTE and Grad Cohort menu items do not apply to the IHE Request for UIC Collection.

- SDS Home - The MSDS application's home page, which is the page prior to login.
- Student Data Submission - This screen allows users to access the file upload function and review data they have already submitted.
- Upload File - This is a submenu of the Student Data Submission menu, and allows an authorized user to upload the XML student data file.
- Uploaded File Status - This is a submenu of the Student Data Submission menu, and allows the authorized user to check the status of uploaded file(s) to determine if the file(s) processed successfully (i.e., passed XML schema validation)
- Data Staging Area - This is a submenu of the Student Data Submission menu. If the uploaded file processed successfully, the data are moved to the data Staging Area. This screen allows the authorized user to view uploaded records and where the MSDS conducts field-level data validation.
- Student Data Downloads - This screen allows users to download data they have submitted.
- Search - This screen allows an authorized user to search for individual students using all or portions of the four core fields (first name, last name, date of birth and gender) and/or all digits in the UIC.

Bottom Links (those not already defined)

- About Us - State of Michigan Web page with general information about CEPI.
- State Web Sites - State of Michigan Web page that contains links to State of Michigan Web sites.
- Accessibility Policy - State of Michigan Web page with information on the State's Accessibility Policy.
- Privacy Policy - State of Michigan Web page with information on the State's Privacy Policy.
- Link Policy - State of Michigan Web page with information on the State's Terms of Use and Linking Policy.
- Security Policy - State of Michigan Web page with information on the State's Security Policy.

Getting MSDS Help

In the MSDS, there are several ways to access help. At the screen level, help is available during transactions in the form of a Help window with content that changes to match the screen. Help is available at the top of all screens. Clicking the Help link found in the upper right corner of the screen will prompt another window to open which contains help information related to the screen with which you are currently working:
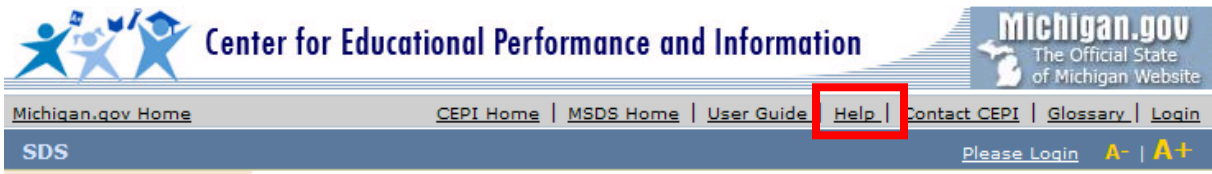

Screen Level

- Steps: Shows step-by-step instructions for using the displayed screen for its main function.
- Tips: Provides additional information for the screen, such as how to sort or filter.
- FAQs: Contains Frequently Asked Questions and their answers related to the information/data fields on the displayed screen.
- Reference: Contains links to reference material including the training manual, data field descriptions and other useful information.
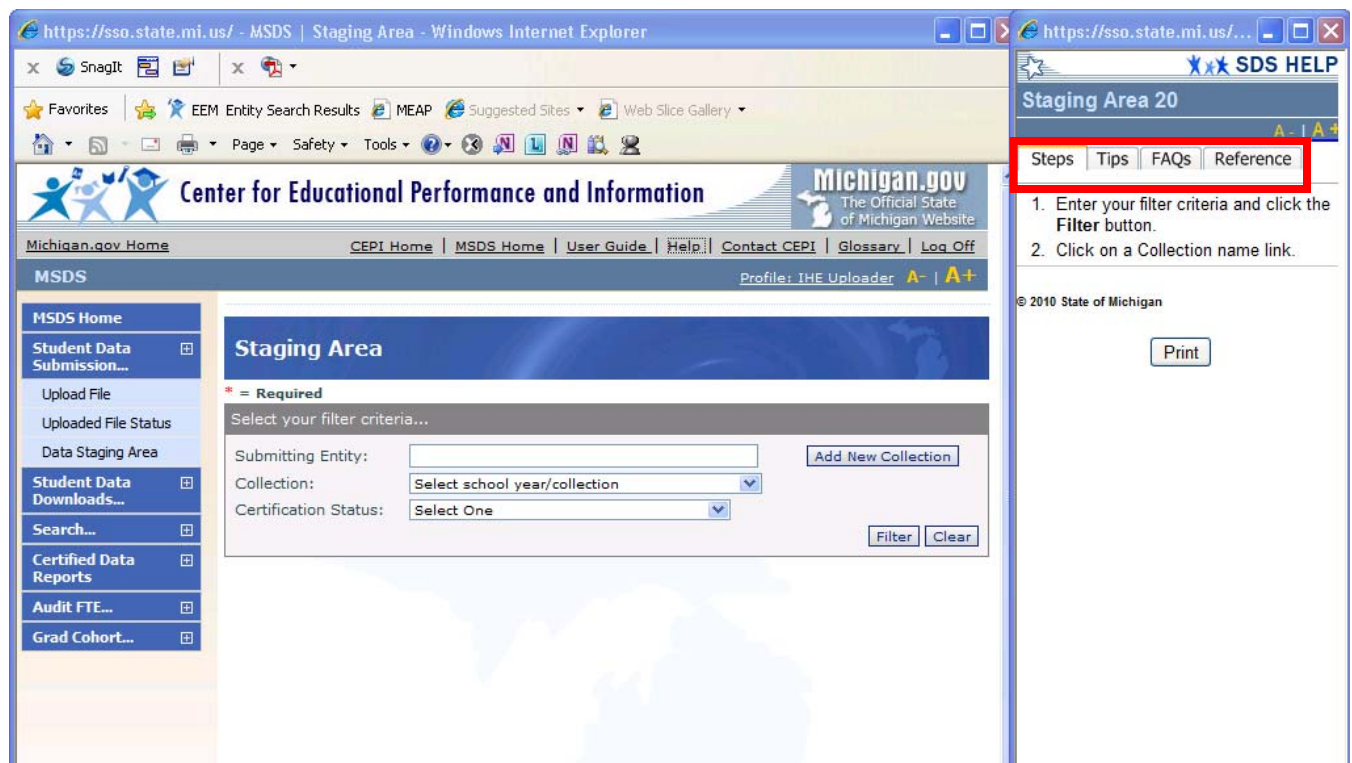
Characteristic Level

Characteristic level help is available to provide information related to any characteristic. A question mark icon displayed to the right of each characteristic leads to characteristic information if you click on it. Clicking on the question mark icon will open a window describing the field in greater detail. This window will include: 1) The characteristic Label that is used on the screen, 2) The characteristic Name, 3) The characteristic Data Type, 4) A description of the characteristic, 5) Instructions related to the characteristic and 6) The permissions that you, as a user, have for working with this characteristic.
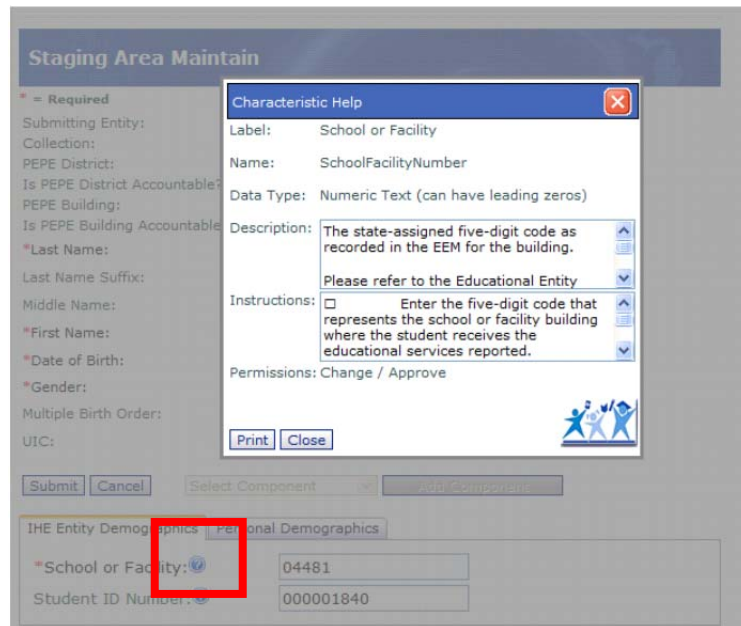
Contact Help Desk

Please visit http://www.michigan.gov/cepi/0,1607,7-113-986_50502_56413---,00.html for the most up-to-date information on the IHE Request for UIC Collection. If you have any questions, please e-mail CEPI customer support at CEPI@michigan.gov. E-mail provides written documentation and allows the quickest, most efficient method for receiving a response. If e-mail is not an option, contact customer support via telephone at (517) 335-0505, option 3. In either case, please include: 1) your name, 2) the application you need help with (in this case it is the MSDS IHE Request for UIC Collection), 3) your telephone number, including area code and extension, 4) your e-mail address and 5) your specific question(s).

To pose a question or start a discussion with other IHEs, the STARR Listserv is available. To join:

1. Go to http://listserv2.michigan.gov.
2. Click on "STARR"
3. Click on "Join or Leave STARR"
4. Fill out the name and address
5. You will be e-mailed a confirmation code. Wait for the code and follow the instructions in the e-mail message.

Submitting Records in the IHE Request for UIC Collection

Your XML file of student data must be uploaded so that the MSDS can validate the data and assign UICs.

Uploading a file

1. From the MSDS homepage, click on the **Student Data Submission** tab from the left-hand menu. This will bring up sub-menus. Click on the **Upload File** tab. This will take you to the File Upload screen.

2. Select the **IHE Request for UIC** collection from the drop-down menu. In the text box, add any user notes specific to the file, if desired.
3. Select the **Browse** button to choose the file to upload. Click on the file name and click "Open" or double click on the file name to populate it into the File Name text box. Click the **Upload File** button.

The MSDS will show a timer to indicate that the file upload is in process. Depending on the rate of transfer, the progress of your file upload may show at the top of the page, with a box similar to this:

Transfer Stage	Progress	Transferred Bytes	Total Bytes	Percentage
WebServer > FileServer		0	0	0.00 %
6/17/2009 11:26:29 AM	Please wait while the file is being prepared for upload..			

Once processed, you may receive a message indicating that your file was "uploaded successfully." Receiving this message <u>does not</u> mean it passed file-level validation.

File Upload Result:
File D0303000.xml uploaded successfully.

Ok
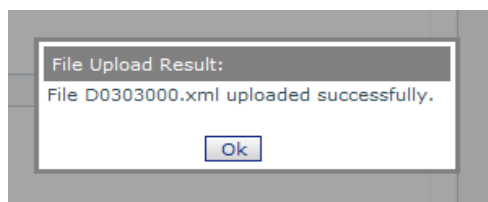
It is important to note how validation occurs in the MSDS.

- File-Level Validation (File Upload) – Although this does happen when the file is uploaded, ideally it should first occur offline. System performance is directly related to the number of files that are uploaded that do not pass file-level validation. Many users have had success using an XML Validation Tool. Please note that an XML Validation Tool will only inform the user if the file passes file-level validation. File-level validation ensures that the file meets the schema.
- Field-Level Validation – Once a file is uploaded and passes file-level validation, the MSDS processes the Field-Level Validation. Once a file is accepted, it is loaded into a Staging Area. Field-level validation may result in field-level errors/warnings.

Checking Your File's Status

4. To check the status of your uploaded file to see if it was accepted or rejected due to file-level validation errors, go to the **Uploaded File Status** tab from the left-hand menu.
5. Select the **IHE Request for UIC** collection from the drop-down menu.
6. Select the **Filter** button. This will take you to a screen showing the results of an uploaded file.
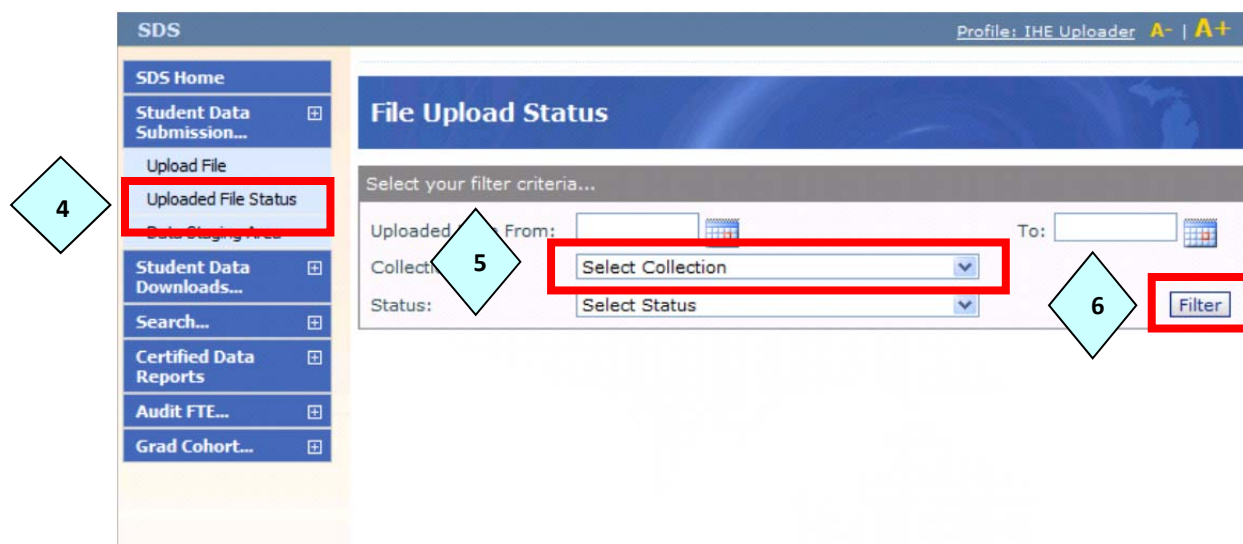
View the Status column to determine if your uploaded file was processed successfully. If the column reads "Processed Successfully," the data have been transferred to the data Staging Area. This screen also shows all files that have been uploaded by your entity that may have been uploaded by a different authorized user. If you wish to view the details of the upload status, click on the hyperlink of the File Name.
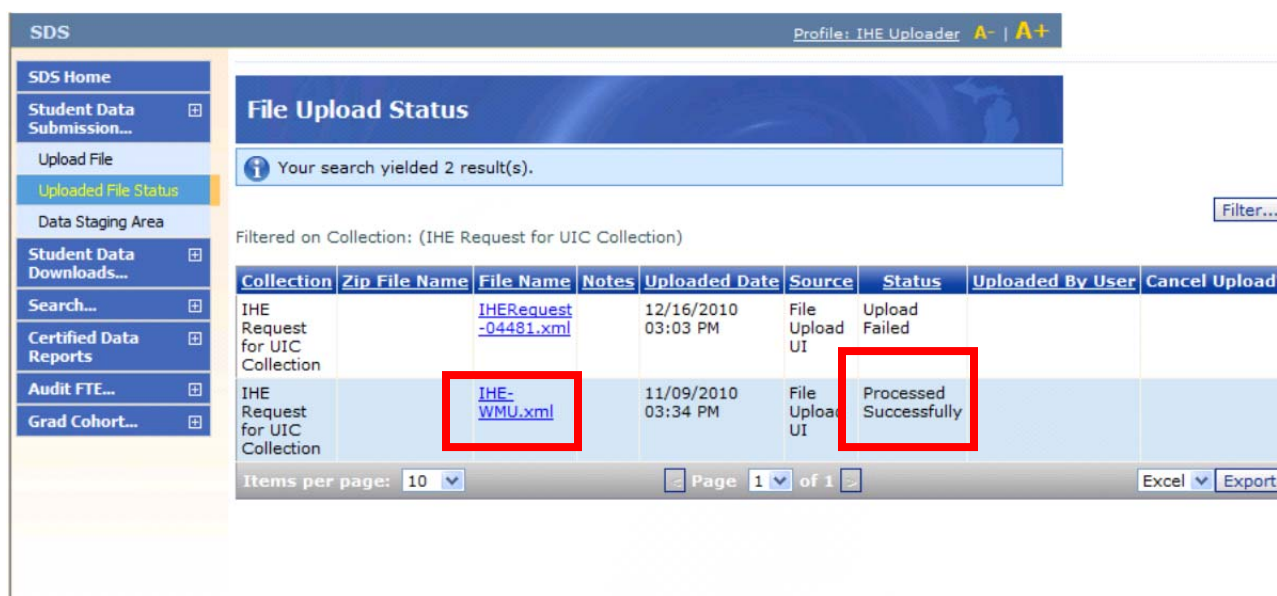
Clicking on the file name will bring up the File Upload Status Details screen, which looks similar to the one below. This screen displays details such as if the file was uploaded successfully or if there were issues with the upload. If the file does not process successfully, the user needs to correct the file-level validation issues and re-upload the file. To exit this screen, click on the **Close** button.
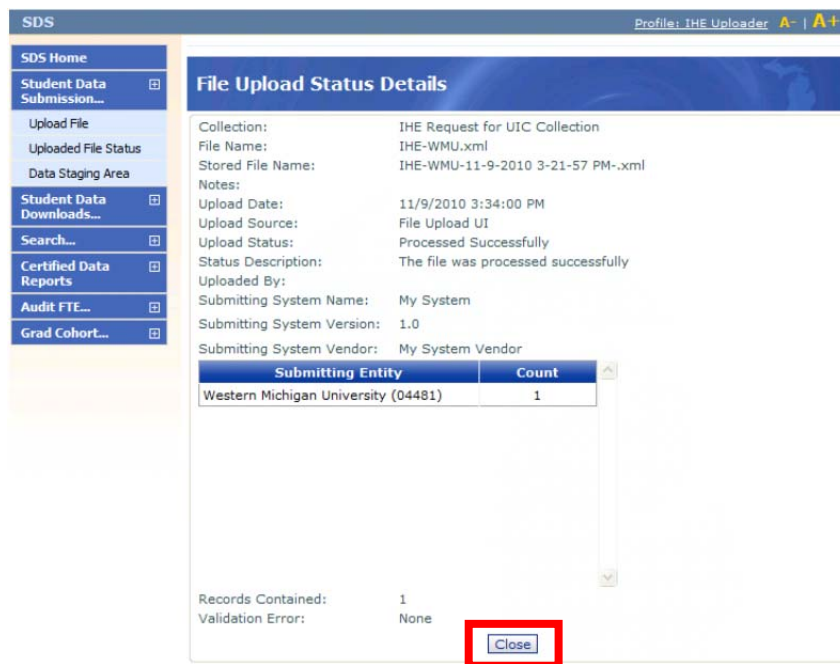
Reviewing Records

After viewing the file upload status and confirming that your file processed successfully, you should next open the data Staging Area. The Staging Area is where:

- The file goes through field-level validation and the UIC matching process
- The user can view which records resulted in a new UIC being generated, a match found or requires resolution
- The user can view field-level errors and warnings
- The user can correct field-level errors (please note that UICs will be assigned despite errors and warnings)

1. To view the records in the Staging Area, click on the **Data Staging Area** tab from the left-hand menu.
2. In the Staging Area screen, select **IHE Request for UIC Collection** in the Collection drop-down box.
3. Click the **Filter** button.
4. Clicking on the Collection Name will take you to the Staging Area Details screen.
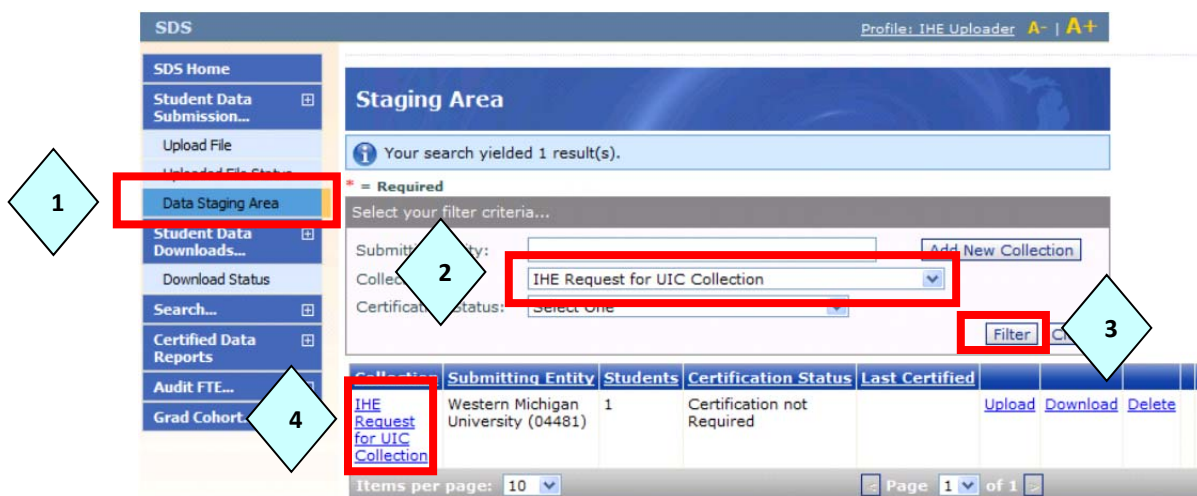
The Staging Area Detail screen displays the errors and warnings with the uploaded records, if any. This screen also displays the results of UIC Matching.

The Staging Area Detail screen is broken into the following five areas:

1. Validation Status (results of field-level validation)
   Lists the number of records where errors exist, records with warnings and records with no errors or warnings. Clicking on the hyperlink of the validation status will filter those records with that status. The records will display at the bottom of the screen.

2. Validation Reports
   Allows you to download reports that give details on which records have errors or warnings.

3. UIC Resolution Status (results of UIC matching)
   Lists the number of records which require resolution, that resulted in a match found and that resulted in a new UIC being generated. Clicking on the hyperlink of the UIC resolution status will filter those records with that status. The records will display at the bottom of the screen.

4. UIC Resolution Reports
   Allows you to download reports that give details on which records require resolution, that resulted in a match found and that resulted in a new UIC being generated.

5. Student Records
   Display at the bottom of the screen. Users can filter the list of records by Validation Status, UIC Resolution Status or by students' last name. Users can also filter the list of students by clicking **Filter.**

Staging Area Detail

Select your filter criteria...

Submitting Entity:	Western School District (38010)
Collection:	Request for UIC Collection ▾

Total Records - 1

1 ◇

Validation Status

Errors Exist	0
Error Free with Warnings	0
Error Free with No Warnings	1
Pending Validation	0
Processing Validation	0
Validation Failed	0

2 ◇

Validation Reports

Select a report: ▾
Select a format: ▾
[Run Report]

3 ◇

UIC Resolution Status

Requires Resolution	1
Match Found	0
Used Previous Resolution Result	0
New UIC Generated	0
New UIC Requested	0
Not Eligible for Resolution	0
Pending Resolution	0
Processing Resolution	0
Requires New UIC Not Allowed for Collection	0
UIC Request Denied	0
UIC Resolution Failed	0

4 ◇

UIC Resolution Reports

Select a report: ▾
Select a format: ▾
[Run Report]

Staging Reports

Select a report: ▾
Select a format: ▾
[Run Report]

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All   [Clear All] [Filter...]

[Select All] [Unselect All] [Delete Selected] [Add Direct] [Search / Add] [Rerun Resolution]

Your search yielded 1 result(s).

5 ◇

Select	School Facility #	User Notes	UIC	Last Name	First Name	Gender	Date of Birth	Validation Status	Resolution Status	Certification Date
☐				Smith	John	M	01/01/1994	Error Free with No Warnings	Requires Resolution	

Items per page: 10 ▾   Page 1 ▾ of 1   Excel ▾ Export

[Select All] [Unselect All] [Delete Selected] [Add Direct] [Search / Add] [Rerun Resolution]

[Back]

UIC Resolution

UIC Resolution is the process of ensuring that each student is correctly associated with a particular UIC. The MSDS application matches every submitted record against the Student Master Record table. The fields used for matching include the First Name, Last Name, Date of Birth and Gender fields. Additional fields that the MSDS uses for matching are the UIC, Last Name Suffix and the Middle Name/Middle Initial fields, if they are provided in the submitted record. The fields in the submitted record are compared against the corresponding fields of records in the Student Master Record table to determine if it is the same student or not. Based on the fields used for matching, a score is calculated that determines how closely the submitted record matches to a record(s) in the Student Master Record table. The calculated score determines if a record requires resolution. Records that require resolution necessitate user intervention to determine which UIC should be associated with a student's record. If no match is found, the system automatically creates a new UIC.

To determine which records require resolution:

1. Click **Student Data Submission** and **Data Staging Area** from left navigation bar.

2. Select the **IHE Request for UIC collection** from the drop-down menu.
3. Click the **Filter** button.
4. Click on the collection name link.
5. Click **Requires Resolution** from UIC Resolution Status section of **Staging Area Detail** page.

6. Scroll to bottom of page and click the **Requires Resolution** link to the right of the student's name.
7. Review the student records presented as possible matches. All possible matches will appear. This could be a single match or several.

8. Click the UIC hyperlink of the possible match record to review the student's history.
9. If you determine that the possible match(es) presented belongs to your student, click "Use this UIC."
10. If you determine that your student is a different student than the student presented as a possible match(es), click "Request New UIC."
11. Enter reason for new UIC request in the UIC Request Comments pop-up box.
12. Click **Submit**.

13. Requests are placed in a queue that the system administrator reviews and approves or denies based on the information submitted in the request. Typical turn-around time is one to two business days. You may review the status of your request on the Manage Requests for UIC screen or on the Staging Area Detail screen.

UIC Resolution Scenarios

Users will encounter several different scenarios when reviewing records that require resolution. Below is a general overview of the different scenarios and the recommended action that the user should take.

Scenario #1 Multiple Possible Matches

When multiple 95-100 percent matches for a submitted record are found, the system cannot determine which UIC should be assigned to the student. Therefore, a user must review the multiple matches and determine if any of the possible matches represent his or her student.

After reviewing the history for each of the possible matches, if the user determines that …

all of the possible matches represent his or her student; he or she should select the UIC with the most recent history record. As both of the UICs represent the same student, the UICs should be linked. See the section on linking UICs for these instructions.

one of the possible matches represents his or her student, the user should select the UIC that represents the student.

none of the possible matches represents the student, than the user should request a new UIC.

Scenario #2 One Possible Match

After reviewing the history of the possible match, if the user determines that…

a. **the possible match represents his or her student**, select that UIC.

b. **the possible match DOES NOT represent the student**, than the user should request a new UIC.

Requesting to Link UICs

The MSDS application allows the linking of students' records when it has been discovered that a student has been assigned two UICs. Linking UICs provides the ability to merge multiple records and the history associated with those records.

Users may find that the same student has been assigned more than one UIC through UIC Resolution or through Student Search. When this occurs, it is important that the user requests that those UICs be linked. Linking UICs allows the history of those student records to be tied together. Linking also allows students to be appropriately tracked over time. A system administrator will review and approve/deny every linking request based on the information provided in the request.

Users can request to link UICs from the Student History screen. This screen is accessed from several screens, including the Student Details screen (Student Search), and the UIC Resolution screens.

1. From the Student History screen, select from the Action dropdown list **Request to Link**.
2. Click the **Go** button.

The Student Link Request form allows users to request to link up to six UICs.

1. Enter each UIC you wish to link in the UIC column.

2. Choose the radio button for the primary UIC. The primary UIC should be the UIC with the most recent history records.
3. Add justification for the link request in the Justification text box.
4. Click the **Validate** button to confirm that you are requesting to link valid UICs.
5. Click the **Submit Request** button.
6. Requests are placed in a queue that the system administrator reviews and approves or denies based on the information submitted in the request. Typical turn-around time is one to two business days. You may review your request and the status of your request on the Manage Linking Requests screen or in Student Search.

Requesting to Unlink UICs

Sometimes UICs are linked and it is determined that those UICs are actually assigned to two different students. If this occurs, users should request to unlink the UICs and split the history of those records. Splitting the history of two previously linked UICs assigns the appropriate history record to the correct UIC.
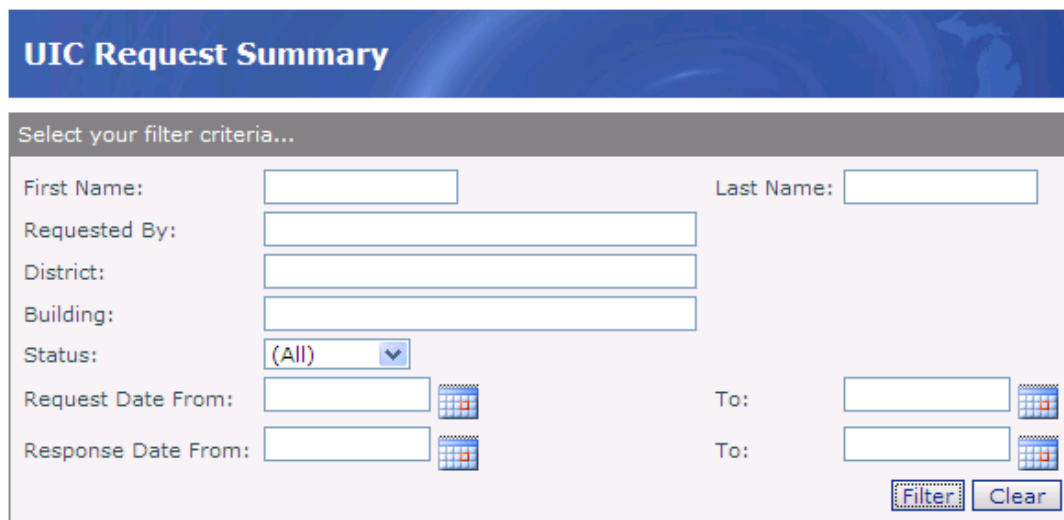
If you determine that UICs have been linked in error, please contact CEPI customer support at CEPI@michigan.gov or call (517) 335-0505 and follow the prompts. Please provide your name, telephone number (including area code and extension), district code and district name (if applicable), along with the UICs and the reason why you believe these UICs have been linked in error.

CEPI will send an e-mail once the UICs have been unlinked.

Manage Requests

Manage Requests for UICs

When a request for a new UIC is submitted, it will display under the Manage Requests for UIC menu. The system administrator reviews these requests on a daily basis and approves/denies based on the information provided in the request. If your request is approved, a new UIC is created. The new UIC is assigned to the student's record and can be viewed on this screen or in the Staging Area in the collection that the user requested the new UIC.

Choose **Manage Requests for UIC** from the **Manage Requests** menu. You'll be able to filter requests by the following fields:

- First Name
- Last name
- Requested By
- District
- Building
- Status
- Requested Date Range
- Response Date Range

1. Once your filter results have been returned, you may click on the **Details** button to review your request. This will bring up the UIC Resolution screen for that student.
2. Use the **Back** and **Next** buttons to move to the next request.
3. Once a system administrator has approved or denied your request, the **Details** button is disabled.

Notes:

- Requests will remain in a new status until a system administrator has reviewed and approved or denied your request.

- Once a request has been approved or denied, the **Details** button becomes disabled.

- You will need to filter the list to review the status of your requests.
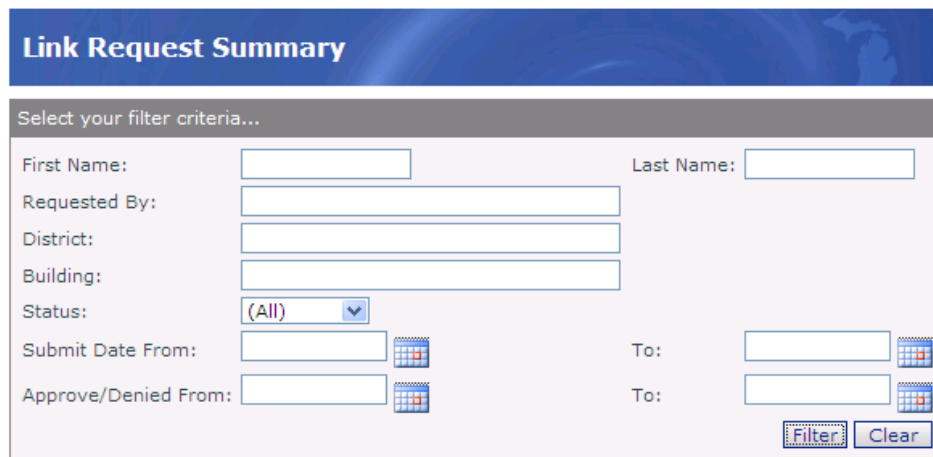
Manage Linking Requests

When a request to link UICs is submitted, it will display under the Manage Linking Requests menu. The system administrator reviews these requests on a daily basis and approves/denies based on the information provided in the request. If your request is approved, the UICs will be linked.

Choose **Manage Linking Request** from the **Manage Requests** menu.

1. Use the filter screen to filter your requests. You may filter on the following fields:

   - First Name
   - Last Name
   - Requested By
   - District
   - Building
   - Status
   - Submit Date
   - Approved/Denied From

2. Once your filter results have been returned, you may review your requests to see if they have been approved or denied by the system administrator. Approved/denied status is shown in the bottom right-hand corner of each request.

Link Request Summary

Filter...

Status (Approved), Request Date From (06/23/2010), Request Date To (06/25/2010)

UIC	Last Name	First Name	Middle Name	D.O.B.	District	Building	Primary
7727916969	DOE	JOHN		01/01/1994	Grosse Ile Township Schools (82300)	Grosse Ile Middle School (01510)	●
4164140895	Doe	Johnny		01/01/1994			○

Request Justification: Same student.

Approver Notes: Request approved.

Resubmit
Approve
Deny
Deny Forever

Requested By: Meghann E Omo   Request Date: 06/24/2010
Response By: Meghann E Omo   Response Date: 06/24/2010   Status   Approved

Items per page: 10   ◁ Page 1 of 1 ▷

Downloading Files

The MSDS will provide you with a report of the UICs (existing or newly created) based on the matching process results. In this report, the UICs will be provided to you in a new column added to the end of your submitted file. The download file is in the same XML format as the uploaded file, except the UIC characteristic is included in the file. The UIC characteristic will be the first characteristic in the Personal Core Component. An example of a downloaded XML file can be found in Appendix A. To download the report:

1. Click the **Student Data Downloads** tab from the left-hand menu. This will bring up a sub-menu. Click on the **Download Status** tab.
2. Click on the **Request New Download** button.

3. Enter your institution's name or entity code, data location and collection.
4. Click on the **Start Download** button.

5. You will be prompted to go back to the **Download Status** screen. Click **Ok**.
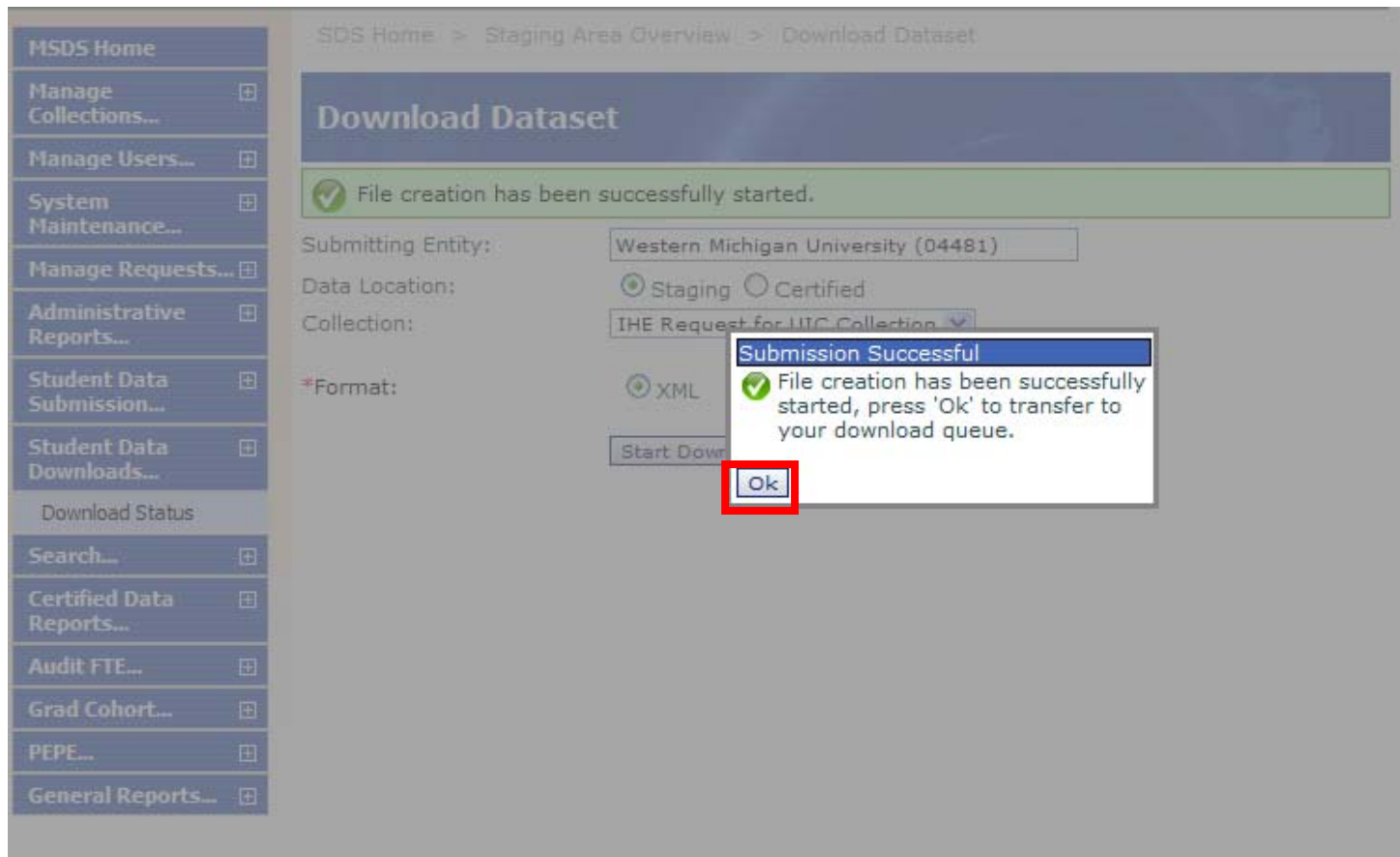
6. The **Download Status** screen will show the status of the requested download. Your file is ready when the filename is a hyperlink.

NOTES: You may need to periodically refresh this screen (by using the F5 key on your keyboard) to display the updated status. To save a copy of your downloaded file, click on the hyperlink of the file name from the Download Status screen. All downloaded files are zipped. You will be prompted to Open or Save the data download. If you are using Windows XP or later, simply double-clicking on the file name will open it in Internet Explorer just like a folder. Other methods may be suited to your needs. Large files may have been separated into smaller files to avoid system time-out issues. Make sure to download all relevant files.

Additional MSDS Functionality

Manually Entering Student Data

If your IHE only needs a few UICs, you may want to consider adding your student data manually rather than doing a file upload to MSDS. To begin:

1. Go to the Data Staging Area screen by clicking on the Data Staging Area tab from the left-hand menu.
2. Enter your five-digit IHE entity code.
3. Click the **Add New Collection** button. If the IHE Request for UIC Collection has already been added for your entity, skip to Step 7.

4. On the Add New Collection screen, choose the Collection from the drop-down list.
5. Click the **Add Collection** button. *Note:* Adding a new collection is only necessary if the collection does not already exist. This is not something you need to do each time you want to manually enter data.

6. You will be taken to the Staging Area page to access your collection. Select the collection from the drop-down menu.
7. Click on the collection name.

To Add a Student:

1. Click on the **Add Direct** button from the Staging Area Detail screen. This will take you to the Add Student screen.

2. Enter all required information. Core field information is required and denoted by a red asterisk (*).
3. Click the **Submit** button. This will submit the student to the IHE Request for UIC Collection, and the user will be returned to the Staging Area Detail screen.

You can also add another student record by clicking on the **Submit/Add Another** button and following the previous steps above to submit the next student to the IHE Request for UIC Collection.

4. Once the record has been added to the Staging Area Detail screen, click on the student's **Last Name** link. This will display the Staging Area Maintain screen.

5. Enter known student information on all appropriate tabs. If entering dates, slashes or dashes may be used. (Format: MM/DD/YYYY)
6. Click the **Submit** button.
7. If errors or warnings are encountered, they will appear below the student information. Correct all errors. Review warnings and make pertinent corrections, then click the **Submit** button again to refresh the data.

Student Search

The MSDS contains the Student Search feature. Use this feature when you want to look up individual students to locate their UICs. To perform a student search:

1. Click on the **Search** tab at the left-hand menu. This will bring up a sub-menu. Click on the **Student Search** tab. This will take you to the Student Search screen.
2. Click the radio button next to **Search By Core Fields.**
3. Type in all or portions of the core fields.
4. Click on the **Filter** button. This will bring up the search results for the student. *Note:* No search results will appear if no matches were found in the system. The search results may also bring up multiple matches. If you discover that there are multiple UICs for your student, the UICs should be linked. See the section on linking UICs for these instructions.

5. Click on the hyperlinked UIC for the student. This will take you to the Student Details screen to view detailed information on the student.

A screen similar to the one below will display for the student.

Appendix A - Download XML Sample with UIC Field Added

```xml
<?xml version="1.0" encoding="utf-8" ?>
<IHERequestforUICGroup SchemaVersionMajor="Collection"
   SchemaVersionMinor="1" CollectionId="108" SubmittingSystemName="My
   System" SubmittingSystemVendor="My System Vendor"
   SubmittingSystemVersion="1.0"
   xsi:noNamespaceSchemaLocation="http://cepi.state.mi.us/msdsxml/IHERequ
   xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <IHERequestforUIC>
    <SubmittingEntity>
       <SubmittingEntityTypeCode>B</SubmittingEntityTypeCode>
       <SubmittingEntityCode>04481</SubmittingEntityCode>
    </SubmittingEntity>
    <PersonalCore>
       <UIC>1111111111</UIC>
       <LastName>Bronco</LastName>
       <FirstName>Buster</FirstName>
       <DateOfBirth>1988-12-12</DateOfBirth>
       <MultipleBirthOrder>0</MultipleBirthOrder>
       <Gender>M</Gender>
    </PersonalCore>
    <IHEEntityDemographics>
       <SchoolFacilityNumber>04481</SchoolFacilityNumber>
       <StudentIdNumber>000001840</StudentIdNumber>
    </IHEEntityDemographics>
    <PersonalDemographics>
       <ResidentLEANumber>33010</ResidentLEANumber>
       <StreetAddress>123 Some Street</StreetAddress>
       <PersonalDemographicsCity>Lansing</PersonalDemographicsCity>
       <State>MI</State>
       <ZipCode>48913</ZipCode>
       <Ethnicity>000010</Ethnicity>
    </PersonalDemographics>
  </IHERequestforUIC>
</IHERequestforUICGroup>
```